

The Value of Sales Automation

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Three Pillars of Sales Automation

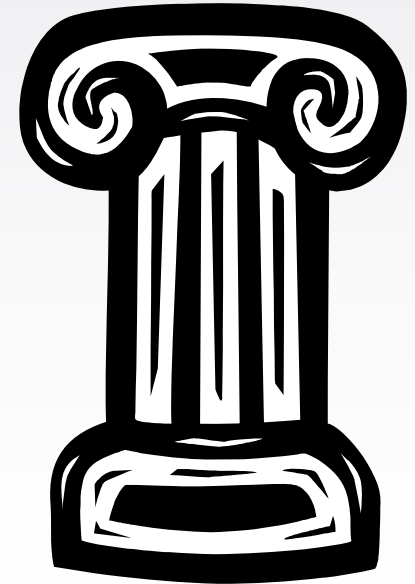
◆ Managing Prospects

- ◆ Drive top line revenue increases



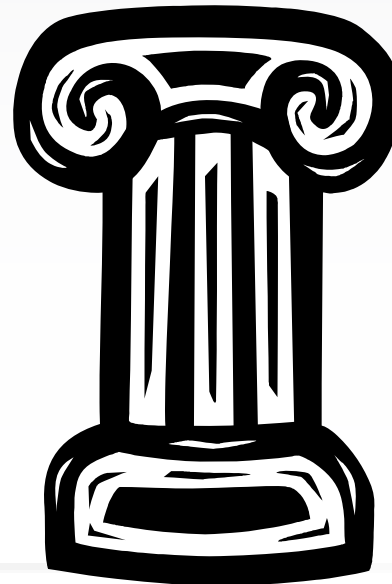
◆ Managing Your People

- ◆ Drive effectiveness and productivity



◆ Managing Customer Base

- ◆ Improve the Customer Experience



“The future belongs to companies that deliver process, not product.”

Jack Welch, former CEO of GE



Sales Process is the #1 key

■ What makes a sales organization successful?

20%

■ Findings: Process is the key

60%

■ The 80/20 Rule is alive and well

20%

“It is not enough to do your best; you must know what to do, and then do your best.”

Edward Deming



Success in Sales

- We also discovered 2 schools of thought:
 - Sales is an art
 - Sales is a science

We believe sales is both

We believe Discipline is most important component

Discipline Brings Consistency



Consistency Brings Predictability



Predictability Brings Something you can Measure



Success in Sales Automation

■ Why Do CRM/SFA Implementations Fail?

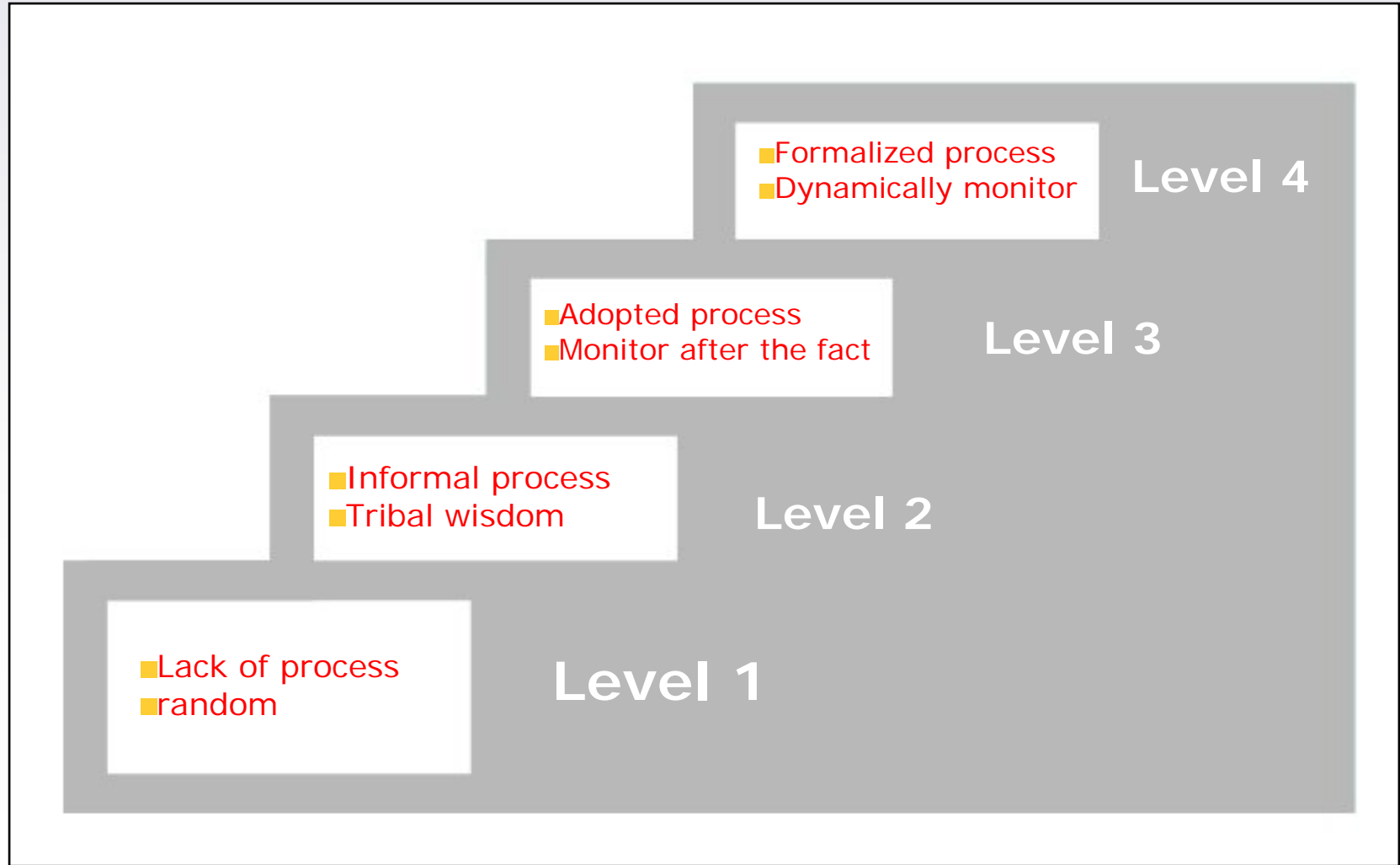
- Automating chaos leads to chaos faster
- CRM/SFA is viewed as a technology investment only
- Reality- Marriage of a technology investment *and* a new way of doing business.

“Does experience help? NO! Not if we are doing the wrong things.”

Edward Deming

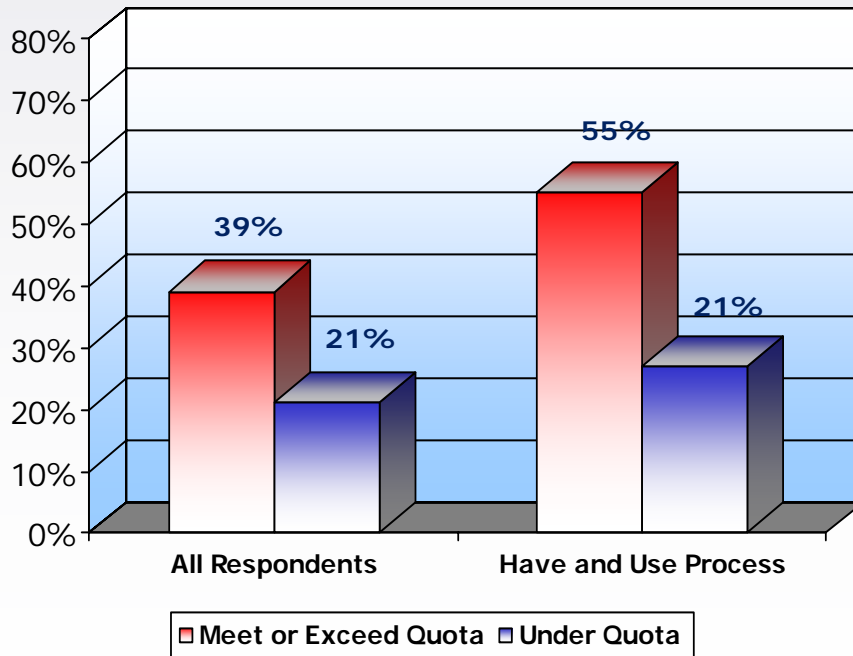


What Level are you?



Manage Your People

Rep Performance vs. Quota



- Fact: 50% of salespeople fail to make plan*
- Companies that can consistently reinforce sales processes have significantly higher than average achievement
- Fact: 17% more salespeople achieve quota at companies that have and enforce a defined sales methodology*
- Nearly 30% lower reduction in turnover rate

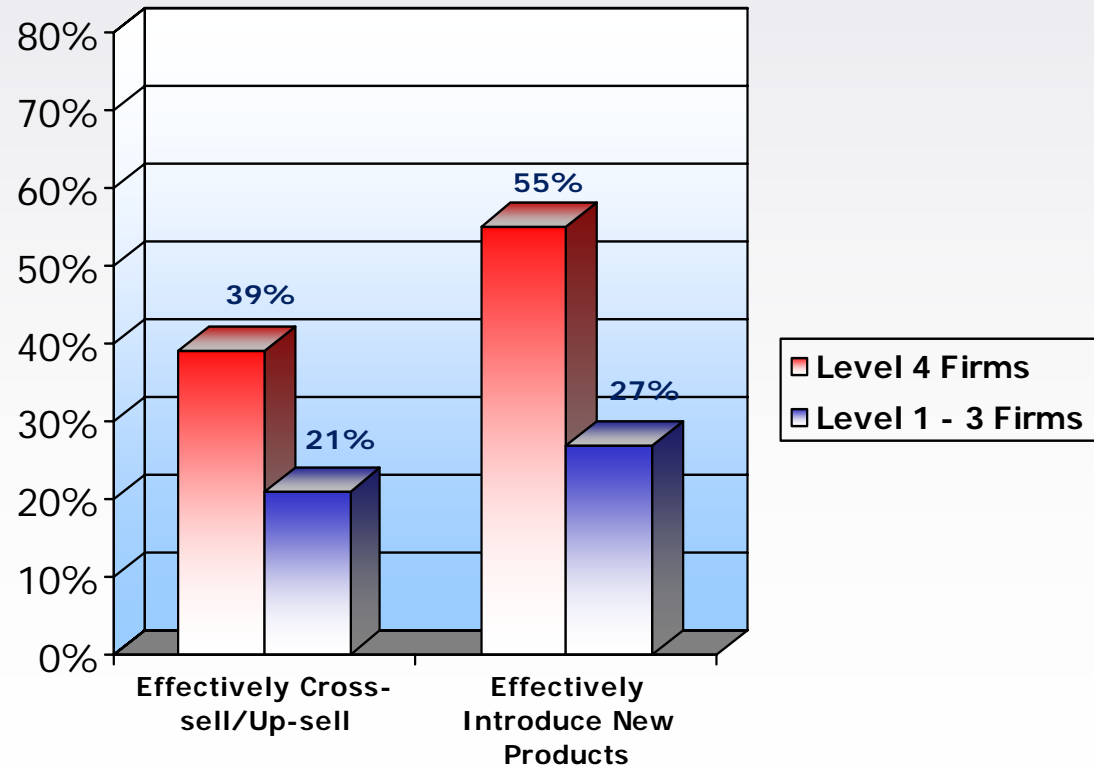
* © CSO Insights.

Survey completed in late 2003 with over 1,300 companies of all sizes and industries by CSO Insights.



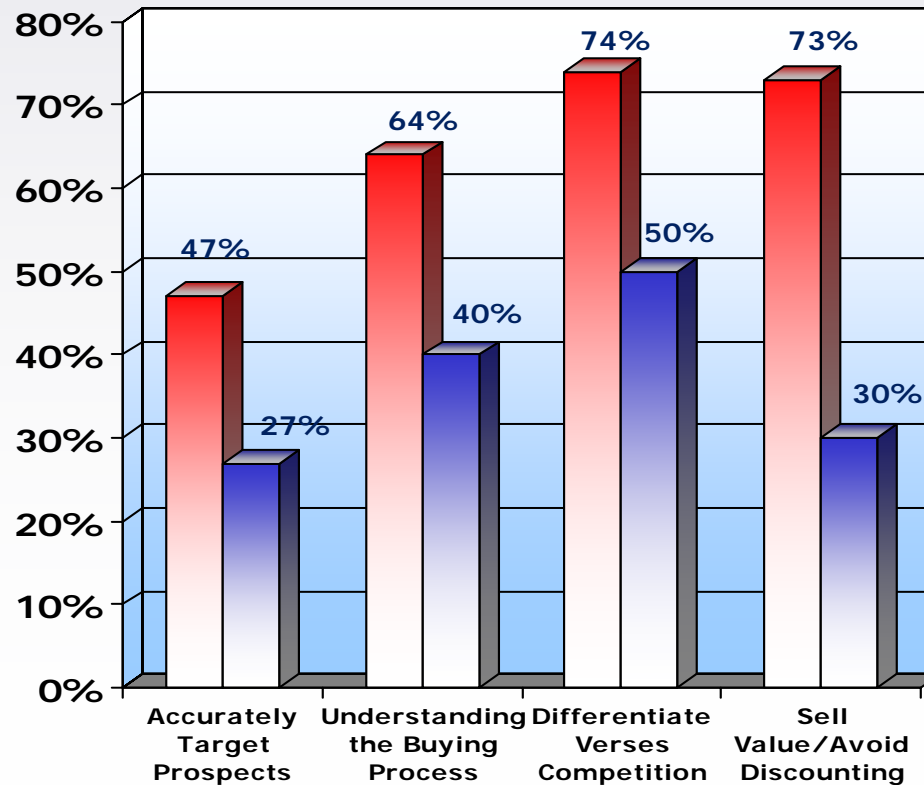
Manage Your Customers

- 18% more effective in cross-selling
- 28% more effective in introducing multiple products



Manage Your Prospects

■ 20% + more effective across the board



■ Level 4 Firms
■ Level 1 - 3 Firms



Guided Performance Selling (GPS)



- Strategy: Create CRM solutions designed to drive the fastest ROI in the industry for companies seeking to improve sales performance



1. **Define** a Blueprint for Sales Success
 - Branded, pre-configured, or custom
 - Using patent-pending workflow

2. **Guide** Sales Best-Practices
 - Prompt user, capture results
 - From anywhere, anytime

3. **Track** Performance
 - On-demand sales results
 - Integrated customer behaviors

Delivered by software, configuration and integration “-as-a-service”

| Step | Step Purpose | Goto | Next Step Due | Next Step Owner |
|---------------------------------|---|------|-----------------|------------------|
| Step 1: Prospect Qualification | Step Purpose: Prospect Qualification | | | |
| 1-1 | Initial Sales Call | 1-2 | [3 days, Adj] | [User Delegated] |
| 1-2 | Positive Mtg/Call, Next Goal Letter | 1-3 | [3 days, Adj] | [User Delegated] |
| 1-3 | Follow-up Meeting/Call, Move to Champion | 1-4 | [3 days, Adj] | [User Delegated] |
| 1-4 | Still Determining Goals | 1-1 | [3 days, Adj] | [User Delegated] |
| 1-5 | Attempts to Contact Made, Move back to Target | 1-1 | [2 days, Adj] | [User Delegated] |
| 1-6 | Not Worth Pursuing NOW, Recontact 3 mos. | 1-1 | [3 months] | [User Delegated] |
| 1-7 | No Identified Need | Lost | [Finished] | |
| 1-8 | Opportunity Not Worth Pursuing EVER | Lost | [Finished] | |
| 1-9 | Website Registration (IMC Only) | Won | [14 Immed, Adj] | [Deal Owner] |
| Step 2: Goal Letter (10% - 10%) | Step Purpose: | | | |
| 2-1 | Results | | | |
| 2-2 | Goal Letter Complete & Delivered (attach to Deal) | 2-3 | [2 days, Adj] | [User Delegated] |
| 2-3 | Still Working on Goal Letter | 2-2 | [2 days, Adj] | [User Delegated] |
| Step 3: Champion (20% - 20%) | Step Purpose: Discovery pre-sale | | | |
| 3-1 | Step Type: Meeting | | | |



Process: Workflow vs. Milestones

1. Configurable workflow sets the time and direction for every interaction

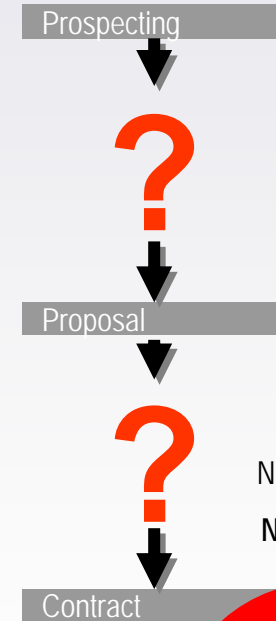
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2. Configurable interaction screen prompts users to reinforce best practices, capture results

Everyone Else's Milestones



No Workflow +
No Reinforcement
No Improvement



Other systems allow salespeople to make up a process each time



Customers



Encoda Systems



- Technology
- Financial Services
- Healthcare/Bio-Tech
- Services
- Communications
- Retail/Other
- Public Sector
- Education



SIEMENS



American Express Incentive Services

Salesnet Growth and Integration

Presented by:
O. John Groebl
Zachary Haley

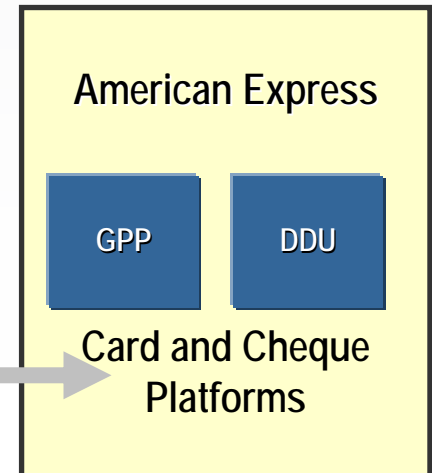
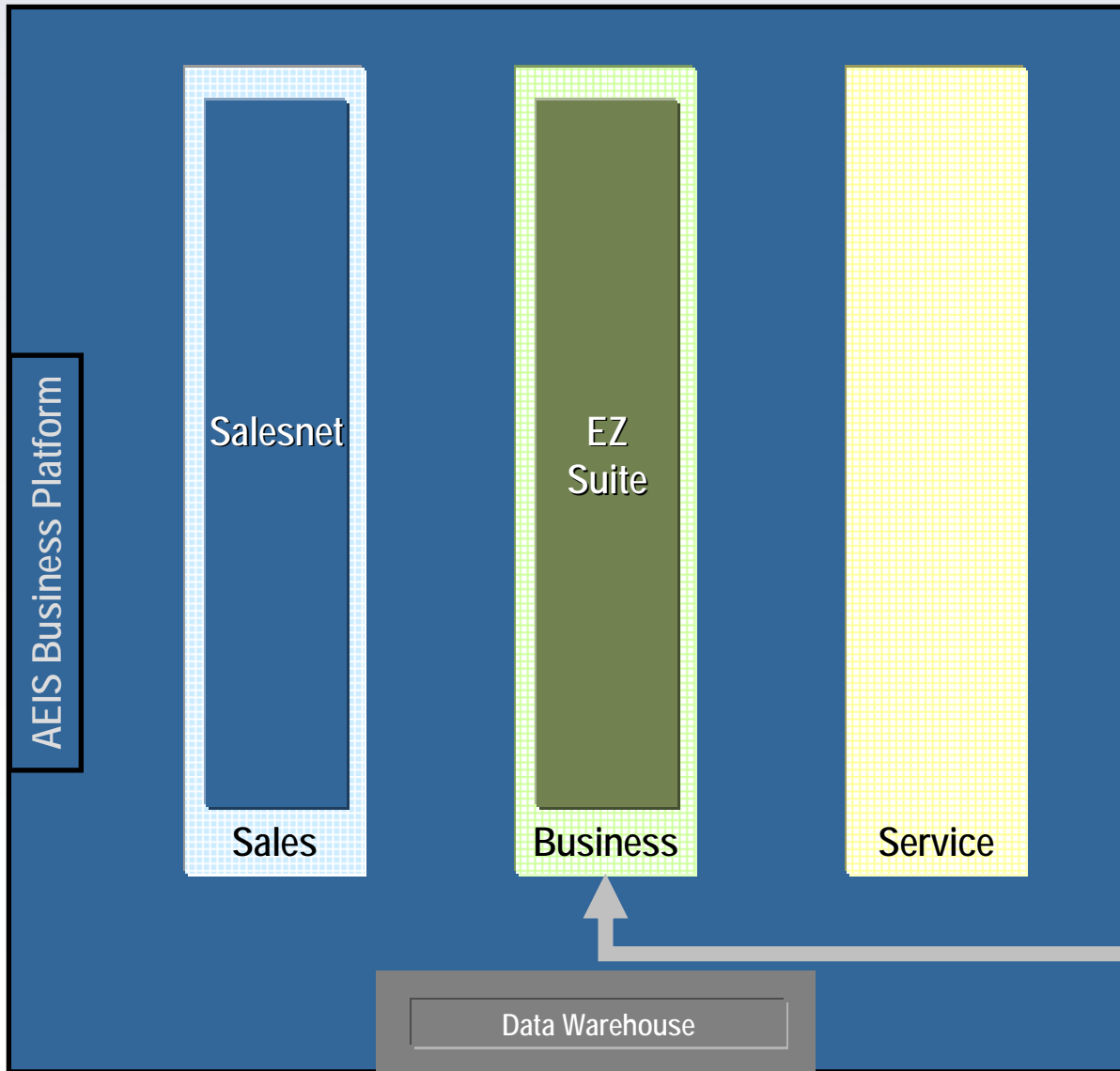


Salesnet: History

- The original version of RightNow Salesnet was rolled out to AEIS in October of 2000
- The original roll-out was for 54 users (now 85)
- Since 2000, RightNow Salesnet has had many owners with various agendas – including it's initial role as a marketing research tool
- The many years of “as-needed” updates and fixes resulted in RightNow Salesnet accumulating numerous screen views, reports and dozens of deal process flows



Past Business Platform Environment

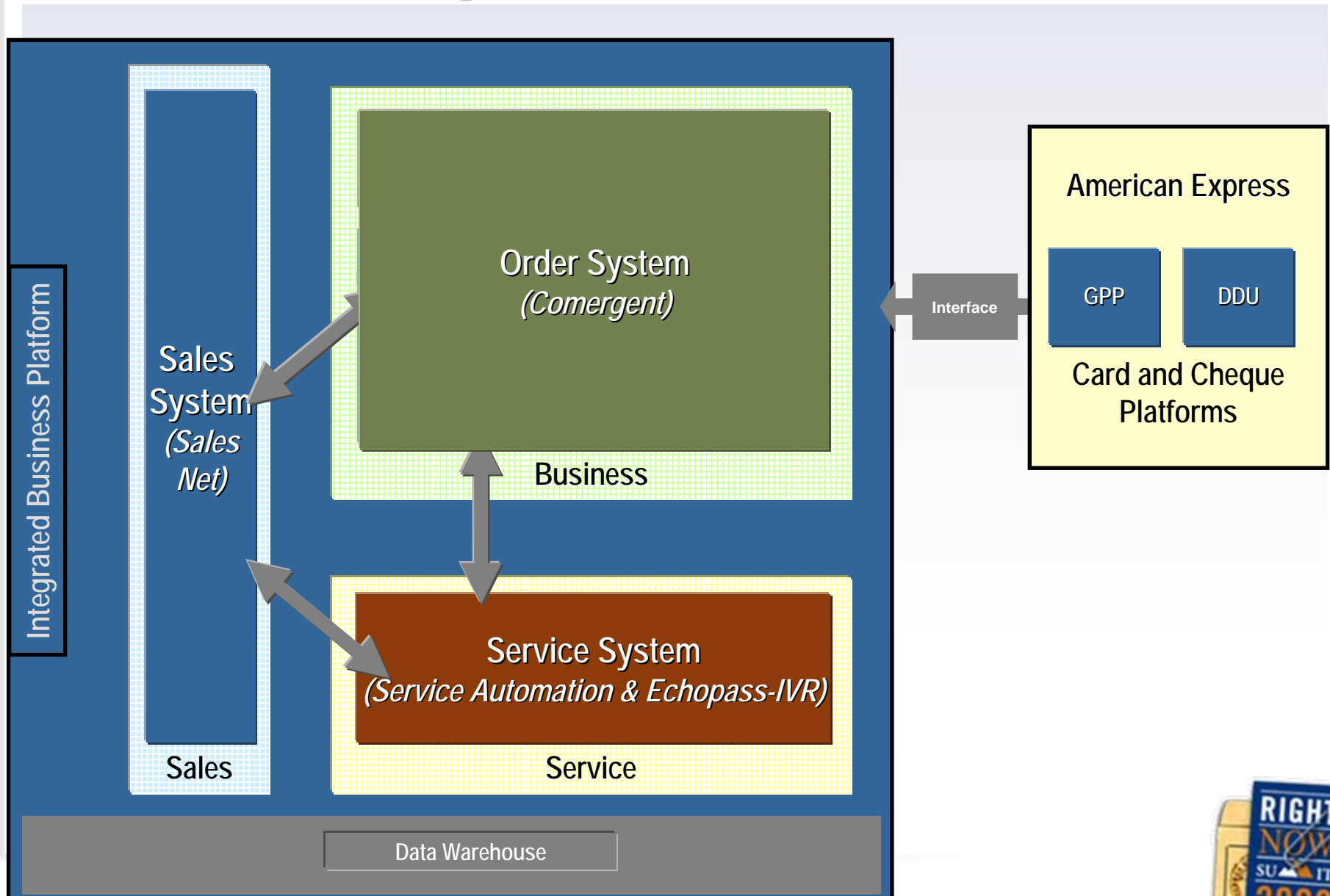


AEIS New Technology Platform

- Initiated in spring 2005, after extensive end to end business analysis
- Cross functional teams were involved with design and implementation
- New platform provided beginning to end flow of business functions and data
- Main goal was eliminating duplicate data entry, greater access to data to internal users and most importantly improved customer support
- Branded “Portico”



Planned Integrated Business Platform



Redeployed RightNow Salesnet

- Redeploying RightNow Salesnet was an outcome from the BSE (Business Strategy Enablement) initiative in June 2005
- The goal was to collapse RightNow Salesnet to simplify its use by reducing the screens and taking complexity out of the Deal Processes. This would reduce training and support needs by having all users use the same tool.
- Simplifying means two things:
 - Collect critical information that drives a deal
 - Loosen the workflow (Deal Process) to allow deals to move through the pipeline more fluently
- Additionally, keep functions such as report and deal management processes that are generally accepted and used in tact



Key RightNow Salesnet Changes

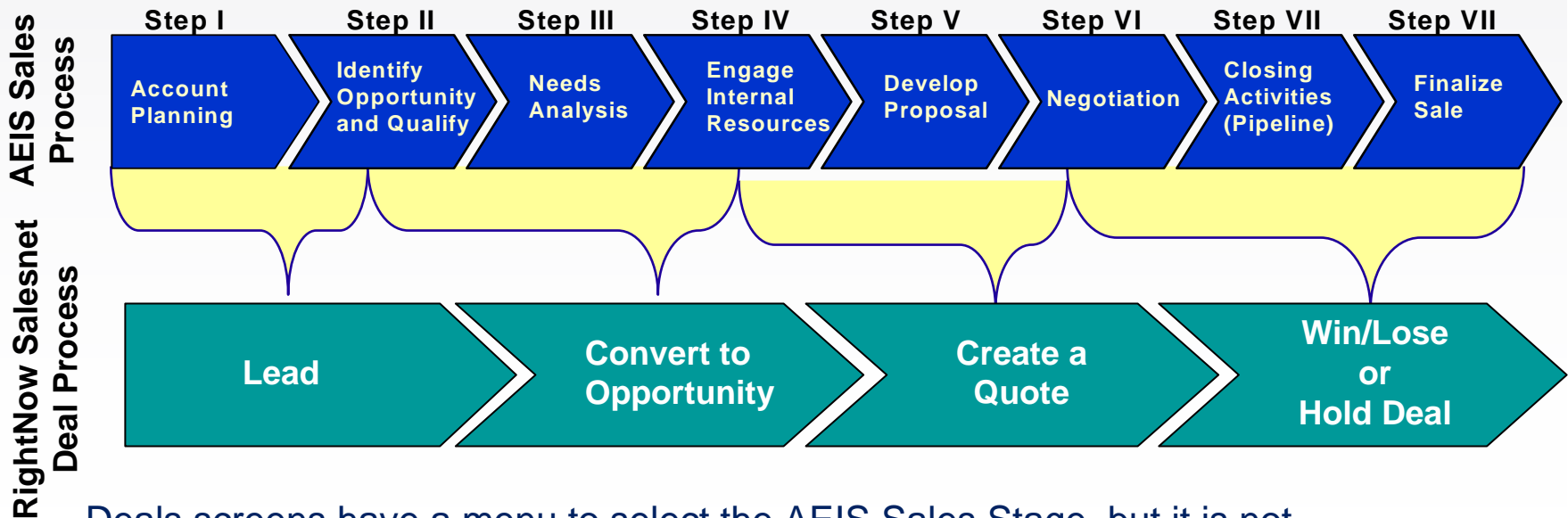
- RightNow Salesnet users will work at the Account, Contact and Deal levels
- There are 3 steps in the deal process – Lead, Initiate Quote and Win/Lose/Hold
- Variations and one-off forms have been eliminated
- More flexibility to skip deal steps has been added
- Current EZ Setup form was used to align the information that must be collected for a quote and order and non-critical fields were eliminated



New AEIS RightNow Salesnet Deal Process

A key challenge for the RightNow Salesnet redesign team was to simplify the tools while providing enough information to direct the business. Revisiting the deal process was critical to success.

The AEIS Sales Process and the RightNow Salesnet Deal Process are separate processes



Deals screens have a menu to select the AEIS Sales Stage, but it is not related to the RightNow Salesnet deal process. This allows the user to jump anywhere in the process quickly and easily.



Account View

Account Information

* Account Name:

Parent Account:

* Owner:

Named/UnNamed:

Web Site:

Notes:

Account Number:

Parent Account Number:

Industry/Business Type:

* Account SPID:

Payment Currency:

Account contains simple business and location information.

Only Account Name and Owner are required.

Parent Account is assigned in the order management system and is read-only

Account Address Information

Address 1:

Address 2:

City: State/Prov: Zip:

Country:

Main Phone: Phone 2: Fax:

Contact View

Account: **Account Sample** [Choose Account](#) | [Add New Account](#) | [Remove](#)

Use Account address information Use Account phone/fax information

Contact Name & Notes

* Owner: Gaines, David

First Name: Last Name:

Dept/Div: Job Title:

Contact Type: Program Administrator Relationship Type: Decision Maker Influencer Add...

Notes:

Referral Program Status: Interested

Referral Notes:

Contact Information

Work Phone 1: Work Mobile:

Work Fax: Work Email 1:

Address Information

Work Address 1:

Work Address 2:

Work City: Work State/Prov: Missouri Work Zip:

Work Country:

Work Web Site:

Checkboxes to link the account information to the contact (no re-keying)

Add a Relationship Type to define if your contact is an influencer, decision maker or opponent of the deal



Deal View (Top Half of Form)

The Deal is the primary screen for managing opportunities.

The form is broken into small, logical sections to help focus information collection that will create a quote.

? Add Deal

Copy Details from Existing Deal Save and: View Deal Detail **Save** **Cancel**

* Name: Account Sample Location II Deal (#01)

Deal Ownership

* Owner: Gaines, David **Deal Process** * Sales Process Start Version (Change) * 1st Step 2/18/2006

* SPID: * Start Date:

Secondary SPID: * Finish Date:

Deal Information

AEIS 5% - Lead Deal Type:

Sales Stage:

Account Type: Pre Pay Payment Method:

Issuance Details: Payment Currency:

Notes:

Expected Deal Sizing

| | | |
|--|--|---|
| Total Deal Value (\$): <input type="text"/> | Value - Curr Fiscal (\$): <input type="text"/> | Value - Next Fiscal (\$): <input type="text"/> |
| Value Actual (\$): <input type="text"/> | Value - Months 1-12 (\$): <input type="text"/> | Value - Months 13-24 (\$): <input type="text"/> |
| # Cards/Cheques (Program Annual): <input type="text"/> | # of Cards/ Cheques for Deal: <input type="text"/> | |
| # Cards/Cheques (First Issuance): <input type="text"/> | | First Issuance Value (\$): <input type="text"/> |

As stated, the AEIS Sales Stage menu includes all process steps and should be maintained and accurate, but Salesnet will allow jumping to quote and close with a step-by-step progression.

Deal View (Bottom Half of Form)

Product of Interest

| | |
|--|---|
| Product Type: <input type="text"/> | Product Details: <input type="text"/> |
| Product Interest 1: <input type="text"/> | First Issuance Date: <input type="text"/> |
| Program Replaced: <input type="text"/> | Date: <input type="text"/> |
| Custom Plastic: <input type="text"/> | Ability: <input type="text"/> |

Competitive Intelligence

| | |
|--|--|
| Competitors Considered: <input type="text"/> | Competitor Product: <input type="text"/> |
|--|--|

Quote Information
Deal Value: Date Actual: Quote Link:
Product: Issuance Actual:

Lead Generation Information

| | | |
|---|-------------------------------------|------------------------------------|
| CSR: <input type="text"/> | Named/UnNamed: <input type="text"/> | Lead Urgency: <input type="text"/> |
| Product Qualifier: <input type="text"/> | | |
| Lead Source: <input type="text"/> | | |
| Lead Notes: <input type="text"/> | | |

Contacts [Choose Existing Contacts](#) | [Add New Contact](#)

| | Contact (select primary) | Account | Job Title | Work Phone | Owner |
|------------------------|--------------------------------|----------------------------|-----------|--------------|---------------|
| Remove | <input type="radio"/> Jane Doe | Account Sample Location II | Dir of HR | 555-555-5555 | Gaines, David |

The Deal edit view contains a view only section for view quote information. This includes

- A link to the quote in the order system.
- Click it pull up the quote.
- Also included is the total number card purchases against the program to date.



Completing a Deal Step

Notes:

Deal Steps | Contacts | Related Recs | Appts/Tasks | Multi-Notes | Attached Docs | Comm Events | Linked Email

Display Deal Steps for All Related Deals

Complete Current Step | **Edit Current Step**

Primary Contact: [Jane Doe \(Account Sample\)](#) | 555-555-5555 | frntfloat@aim.com

Current Step Detail

Step: **Active Deal** | Step Ownr: | Step Pr

Step Due: 2/20/2006 | Step Pr

Step Notes:

Complete Current Step

Deal: **Account Sample Deal (#01)** (This Deal is currently Open)

Current Step: **Active Deal** | Current Step Owner: **Gaines, David**

Step Completion Date: 2/19/2006

Step Result: **Initiate Quote Process**

Notes:


- Initiate Quote Process
- Deal On Hold
- Lost Deal

Next Step Detail

Next Step: **Initiate Quote Process** | Owner of Next Step: **Gaines, David**

Due Date of Next Step: 2/19/2006 | Probability of Winning: 35 %

Save | **Cancel**



AEIS... Where We Are Today!

- August 13th – Portico successfully went into production
- Phased conversion of clients planned over course of next three months
 - Consisting of 7 separate client groups
- All RightNow Salesnet users have been utilizing new streamlined Deal Process for last 2 months
- For first time in AEIS history, we have a completely integrated flow from lead, client set up, ordering, and client servicing



Thank You!

- Questions
- Contact info:
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